

EXPLORING MARKET OPPORTUNITIES FOR LOCAL AND SUSTAINABLE POULTRY PRODUCTION

March 2002

Social Science Research Unit Report 02-01

J. D. Wulforth
Sandra E. Cann
Junjia Zhu
Barbara Foltz

Survey conducted by

Social Science Research Unit
University of Idaho
P.O. Box 444290
Moscow, ID 83844-4290
(208) 885-5595

Table of Contents

Introduction	3
Methodology	3
Data Collection	3
Respondent Profile.....	4
Findings.....	7
General Questions	7
Questions about “Pastured Poultry” Chicken	8
Questions about “Pastured Poultry” Eggs.....	10
Questions about purchasing “Pastured Poultry” Products	12
Questions about “Free-range” Chicken	13
Questions about “Free-range” Eggs.....	14
Questions about buying “Free-range” Products.....	17
Factors affecting purchase of poultry products.....	18
Summary	22
Appendices	23
Appendix 1. Questionnaire	23
Appendix 2. Pastured Poultry Counties	32
Appendix 3. Postcard.....	33

Introduction

In April of 2001, representatives from the Idaho Organic Alliance contacted the Social Science Research Unit (SSRU) at the University of Idaho to request assistance with a survey project. The working group, funded through the Henry A. Wallace Center for Agricultural & Environmental Policy and the U.S. Department of Agriculture, was awarded funding to investigate the market opportunities related to Pastured Poultry products in the southwestern Idaho region. The purposes of the survey component of this project were to: 1) learn about the habits and preferences of poultry consumers in an eighteen-county region of southern Idaho, and 2) determine the market supply and demand for certain poultry-related products in this region.

The SSRU, a part of the College of Agricultural and Life Sciences at the University of Idaho, had the responsibility to develop questions, administer the telephone surveys, provide statistical analyses, interpret survey data, and prepare a summary report for this project. Results from this study are based on an overall response rate of 52% from an original sample of size of 800 individuals contacted during January and February 2002.

Methodology

Data Collection

Questions were developed to inquire about consumer preferences and consumption of poultry products to help determine the feasibility of expanding the pastured poultry market in southern Idaho. The Social Science Research Unit consulted with Janie Burns, a farmer in Nampa, Idaho, during the research design phase to assure that they would meet the needs of this project. The final questionnaire consisted of twenty-eight (28) consumer habit and preference questions and six (6) demographic questions (see Appendix 1). The SPSS Data Entry Builder 3.0 was used to prepare the questionnaire for data entry by the SSRU telephone interviewers.

Survey Sampling Incorporated (SSI), in Fairfield, Connecticut assisted the Social Science Research Unit in constructing a sampling frame for this project. SSRU purchased a sample of individuals in 800 Idaho households who lived in the eighteen counties of this study (see Appendix 2).

In preparation for the telephone surveys, the SSRU interviewers were given material that covered information about the purpose of the study and definitions of terms used in the questionnaire, as well as instruction on the basics of proper telephone interviewing. Interviewers were also trained in the use of Computer Assisted Telephone Interviewing.

Using the Dillman¹ method to ensure an adequate response rate, a postcard was sent on January 22, 2002 to all potential respondents prior to telephone calls beginning. The postcard informed the individuals that a survey was in progress and that they would be called during the following week (see Appendix 3.). Telephone interviews began one week later. In an attempt to reach as many potential respondents as possible, interviewers staggered calls in the mornings, afternoons, evenings, and over two weekends. As calls were made to potential respondents, the interviewers recorded those who: 1) completed the surveys, 2) asked to be called back, 3) were no longer eligible to participate, and 4) those that refused to take part in the survey. Interviewers were monitored during each calling session by a trained supervisor. The telephone interviews ended on February 20, 2002.

Based on an overall sample size of eight hundred (800) individuals, 52% of those contacted completed a survey, while 30% of those contacted refused to complete the survey. The remaining respondents were either ineligible or non-respondents. SSRU accounted for the higher than average refusal rate due to a lack of perceived knowledge about the subject based on comments made by many of those contacted.

Data were collected into the SPSS data analysis program following the completion of the telephone interviews. The data were carefully verified and checked for errors before data analysis began.

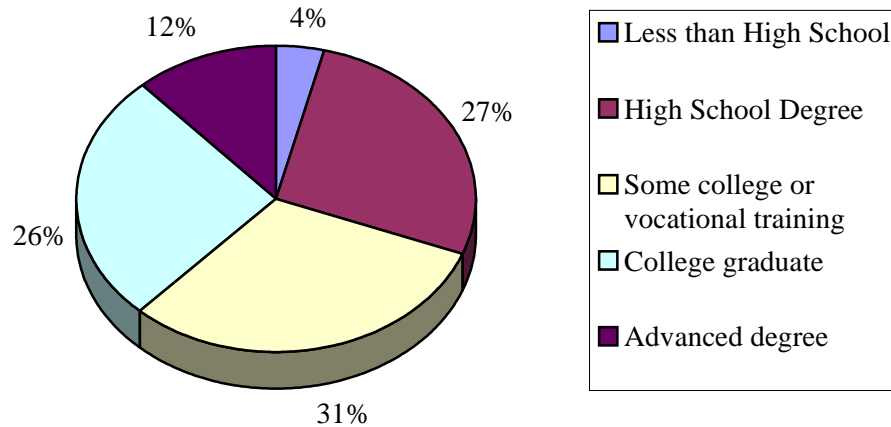
Respondent Profile

Of the three hundred and seventeen (317) consumers completed the pastured poultry telephone survey, sixty-five (65%) were female and thirty-five percent (35%) of them were male

Thirty-one percent (31%) of all the respondents have some college or vocational training. Nearly the same percentage of respondents indicated they have a high school degree (27%) as did those who indicated they were college graduates (26%). An additional twelve percent (12%) of respondents have an advanced degree while only four percent (4%) have less than a high school degree (see Figure 1).

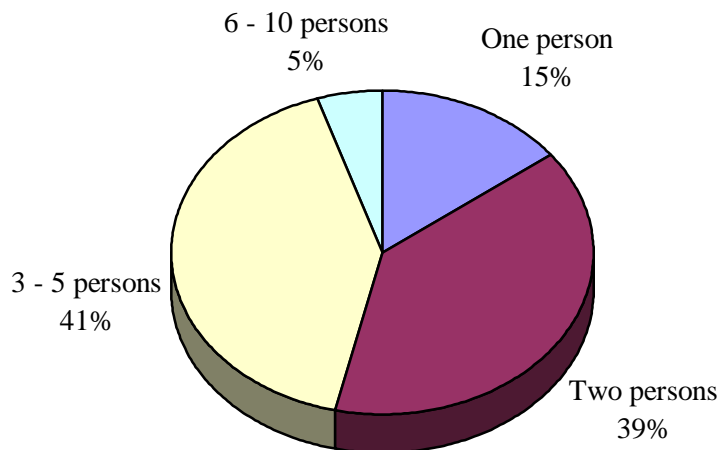
¹ Dillman, D. 1978. Mail and Telephone Surveys: The Total Design Method, Wiley Interscience Publication, New York, NY.

Figure 1. Respondents' highest level of education



Forty-one percent (41%) of the respondents' households had between 3-5 persons; thirty-nine percent (39%) are two-person households; and fifteen percent (15%) are one-person households. The remaining households (5%) have between 6-10 persons (see Figure 2).

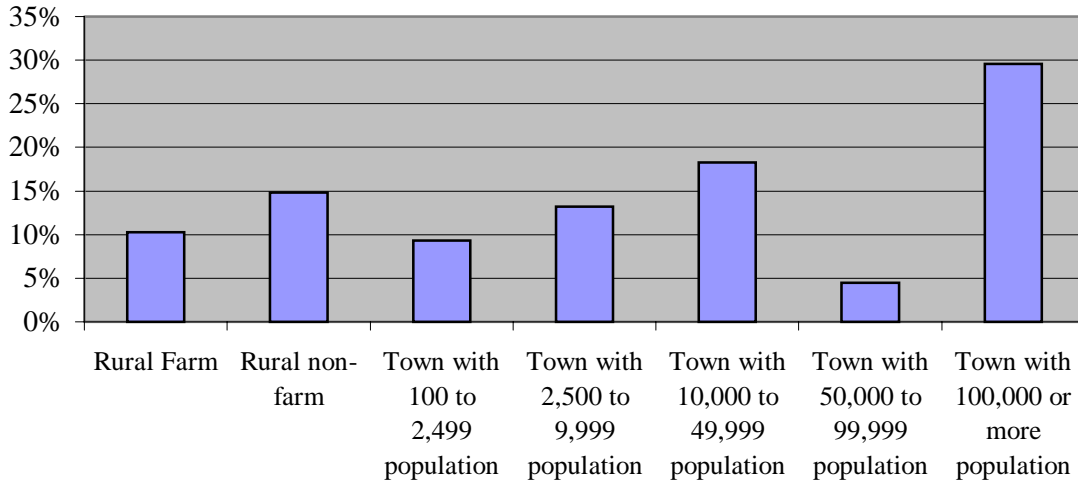
Figure 2. Number of persons living in the respondent's household



Respondents were asked to select from categories that described various sizes of locations where they might live. Thirty-four percent (34%) of the respondents indicated they live in a town with a population that was 50,000 or more. Twenty-three percent (23%) of respondents live in towns ranging in size between 100 to 10,000 persons, and eighteen percent (18%) live in an intermediate size range of towns of 10,000-50,000 persons. The "rural non-farm" category was selected by fifteen percent (15%) of all

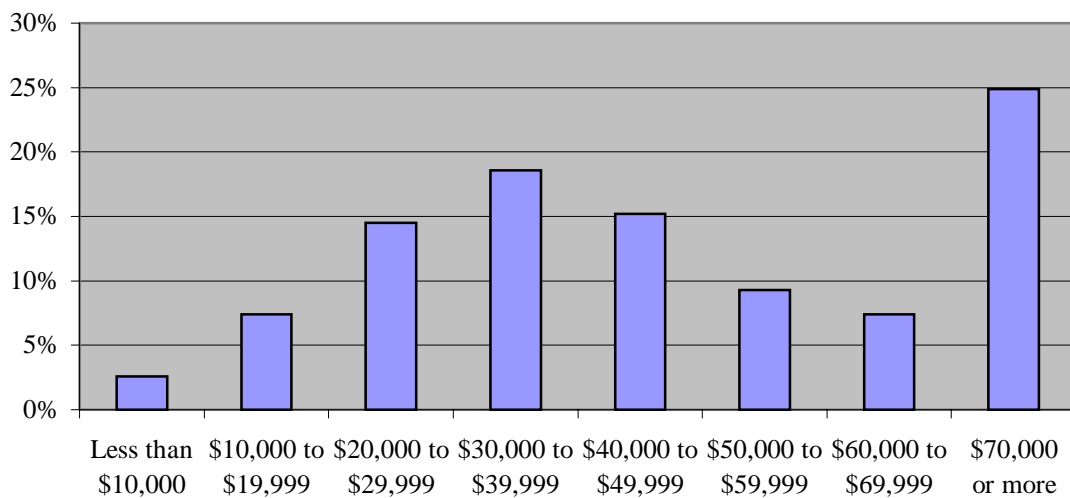
respondents, while the remaining ten (10%) live on a farm. Figure 3 illustrates these data.

Figure 3. Size of community where respondents currently live



Twenty-five percent (25%) of the respondents have an annual household income of \$70,000 or more; nineteen percent (19%) between \$30,000 and \$39,999; fifteen percent (15%) between \$40,000 and \$49,999; and almost fifteen percent (15%) between \$20,000 and \$29,999. The remaining family income categories are shown in Figure 4. The highest income category has a significant proportion of respondents residing in the Boise, Idaho (Ada County) greater metropolitan area.

Figure 4. Respondents' annual household income

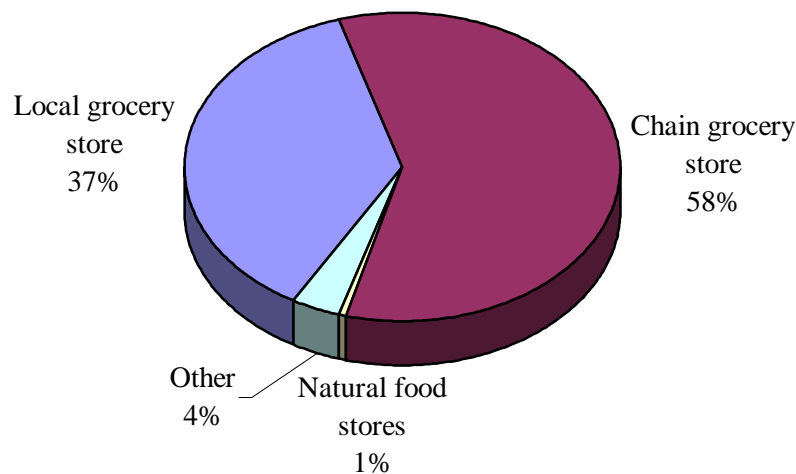


Findings

General Questions

More than half (58%) of the respondents purchase their groceries most often from chain grocery stores and over a third (37%) of the respondents shop most often at a local grocery store.

Figure 5. Where respondents most often purchase their groceries

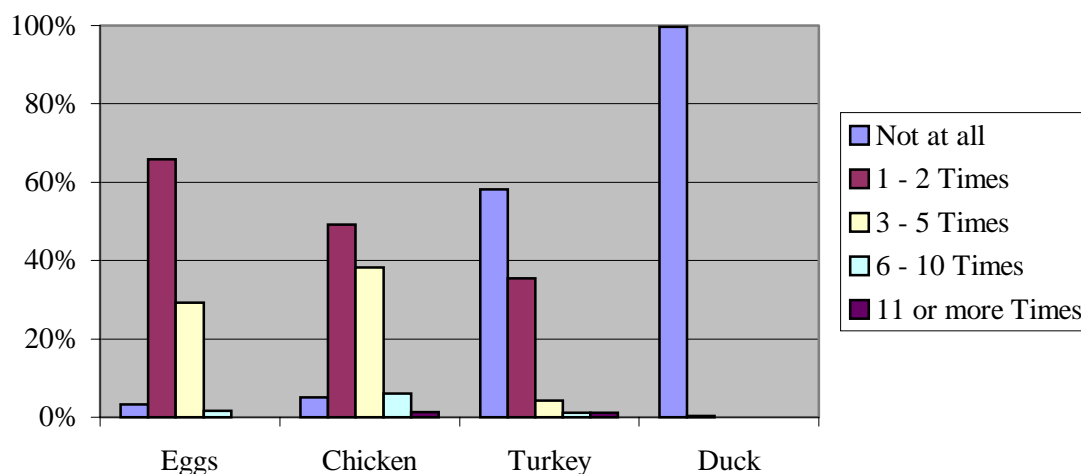


Since this survey was targeted to people who purchase chicken and/or eggs, a set of filtering questions was posed to respondents first in order to categorize them along these criteria. Thus, each respondent in this survey had purchased at least one of these two products at some point. Of the total 317 valid respondents, ninety-two percent (92%) of them have purchased both chicken and eggs; three percent (3%) have purchased chicken only; and five percent (5%) buy only eggs.

Of all the respondents, sixty-eight percent (68%) have purchased turkey, while only two percent (2%) have purchased duck.

Figure 6 illustrates that respondents purchase chicken and eggs regularly. About sixty-six percent (66%) of them buy eggs 1-2 times per month, and twenty-nine percent (29%) buy eggs 3-5 times per month. Forty-nine percent (49%) of the respondents buy chicken 1-2 times per month, and thirty-eight percent (38%) buy chicken 3-5 times per month.

Figure 6. Number of times respondents purchase eggs, chicken, turkey, or duck in a month

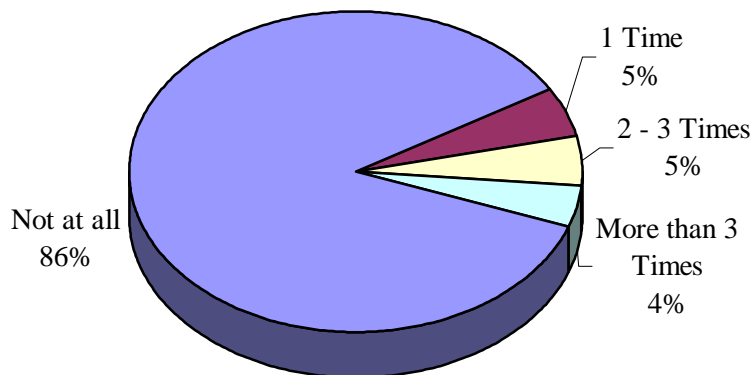


Although the frequencies vary, this chart indicates that a majority of the respondents purchase chicken and/or eggs regularly.

Questions about “Pastured Poultry” Chicken

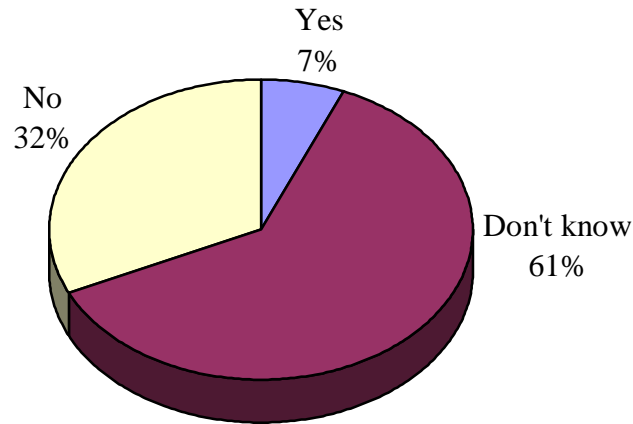
The majority of respondents (86%) had not heard the phrase Pastured Poultry as a type of chicken they could purchase. Only five percent (5%) of the respondents had heard of Pastured Poultry once, five percent (5%) had heard of it 2-3 times, and four percent (4%) had heard of it more than three times (see Figure 7).

Figure 7. Number of times respondents had heard the phrase "Pastured Poultry" when purchasing chicken



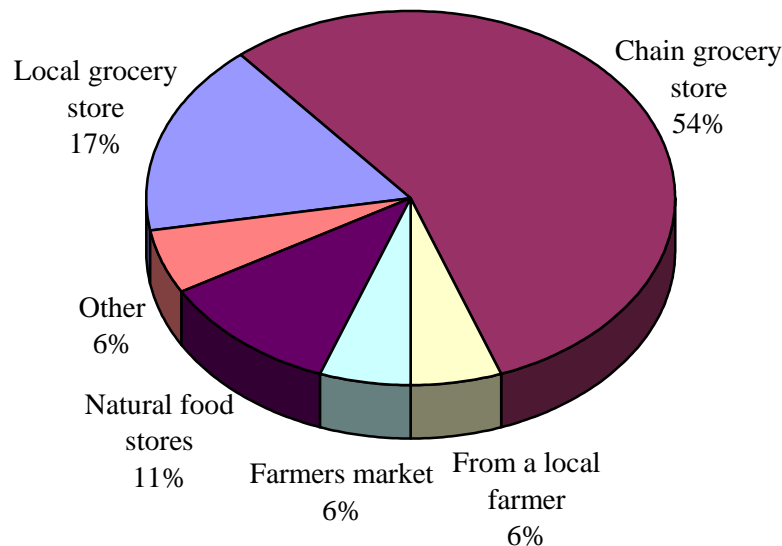
When asked if they had purchased a Pastured Poultry chicken while shopping, seven percent (7%) indicated “Yes,” while thirty-two percent (32%) indicated “No.” Sixty-one percent (61%) “Did not know” whether or not they had purchased one (see Figure 8).

Figure 8. Have respondents purchased "Pastured Poultry" chicken?



Of the respondents who indicated prior purchases of Pastured Poultry chicken, fifty-four percent (54%) of them purchased it in chain grocery stores and seventeen percent (17%) of them in local grocery stores (see Figure 9).²

Figure 9. Where respondents purchase "Pastured Poultry" chicken



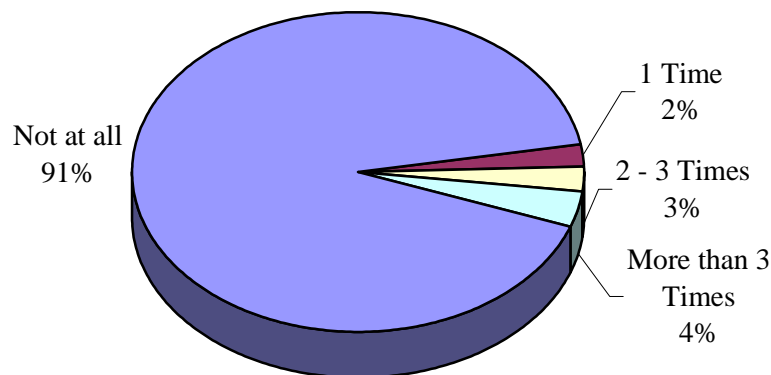
²Based on the limited number of respondents who indicated they had purchased Pastured Poultry products, the percentages in Figure 9 are not necessarily statistically representative of the population as a whole.

Half of all respondents (50%) also indicated that the price for Pastured Poultry chicken was more than other poultry products, and forty-four percent (44%) said the price was about the same as other poultry products. Only six percent (6%) said Pastured Poultry chicken was less than other chicken.

Questions about “Pastured Poultry” Eggs

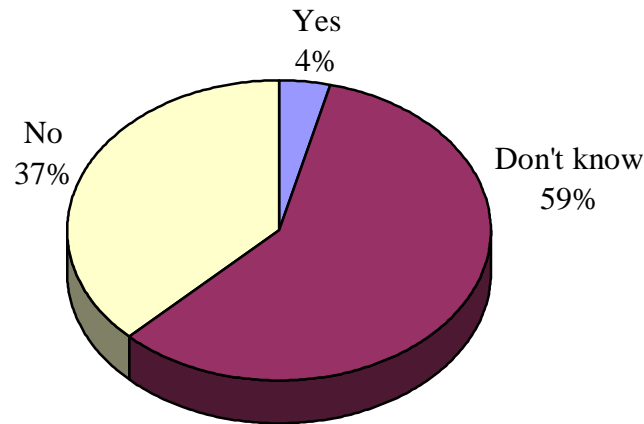
Most (91%) respondents had not heard the phrase “Pastured Poultry” in association with the purchase of eggs. Only two percent (2%) of the respondents indicated they had heard the phrase once, three percent (3%) had heard it 2-3 times, and four percent (4%) have heard it more than three times (see Figure 10).

Figure 10. Number of times respondents had heard the phrase "Pastured Poultry" when purchasing eggs



Only four percent (4%) of the respondents who buy eggs, said they had purchased Pastured Poultry eggs when they were shopping, while thirty-seven percent (37%) said they had not purchased any, and fifty-nine percent (59%) indicated they were not sure whether or not they have purchased Pastured Poultry eggs (see Figure 11).

Figure 11. Have respondents purchased "Pastured Poultry" eggs?

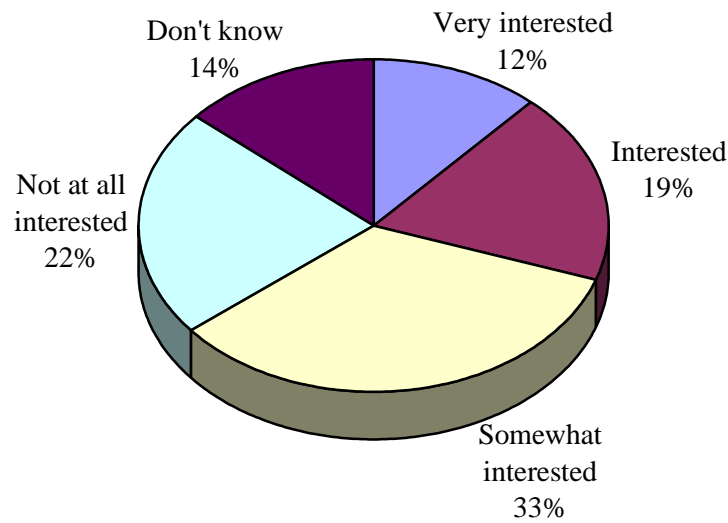


Of the respondents who said they had purchased Pastured Poultry eggs, three-fourths (75%) bought the eggs in chain grocery stores and one-fourth (25%) in local grocery stores. About one third (34%) of the respondents responded that the price for Pastured Poultry eggs was higher than other poultry products, while fifty-eight percent (58%) said the price was about the same as other poultry products. Only eight percent (8%) said that Pastured Poultry eggs cost less than other poultry products.

Questions about purchasing “Pastured Poultry” Products

Twelve percent (12%) of all respondents indicated they would be “Very Interested” in purchasing “Pastured Poultry” chicken or eggs if it was available in their community. An additional nineteen percent (19%) expressed an “Interest” and another one-third of all respondents (33%) were “Somewhat Interested” in purchasing “Pastured Poultry” chicken or eggs. Less than one-quarter of those surveyed (22%) indicated they were “Not Interested” at all in this type of chicken or eggs. An additional fourteen percent (14%) of respondents indicated uncertain levels of interest to purchase Pastured Poultry (see Figure 12).

Figure 12. Level of interest to purchase Pastured Poultry chicken or eggs if available in the community



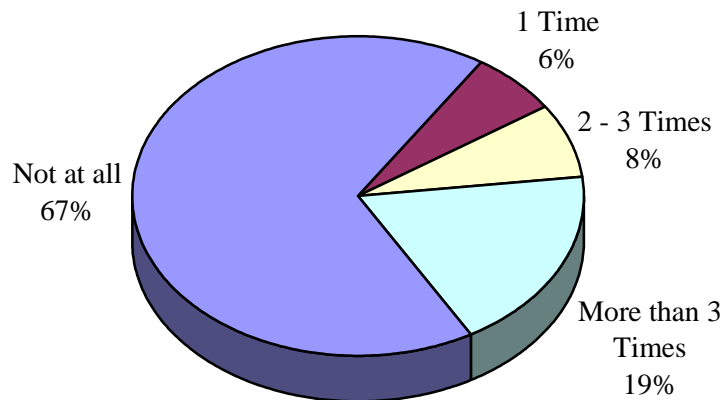
The respondents who were “Very Interested, Interested, or Somewhat Interested” in buying Pastured Poultry chicken or eggs were asked how much they would be willing to pay for these two products. For Pastured Poultry chicken, sixty-two percent (62%) of those surveyed responded the price should be the same as that for other chicken, while twenty-two percent (22%) indicated the price should be between \$2.00-\$2.25 per pound, eight percent (8%) responded between \$2.26-\$2.50 per pound, and two percent (2%) indicated they would pay up to \$2.51-\$2.75 per pound.

In regard to Pastured Poultry eggs, sixty-six percent (66%) of respondents indicated the price should be the same as for other eggs, thirty percent (30%) responded they would pay between \$1.50-\$1.99 per dozen, and two percent (2%) indicated a willingness to pay up to \$2.00-\$2.99 per dozen.

Questions about “Free-range” Chicken

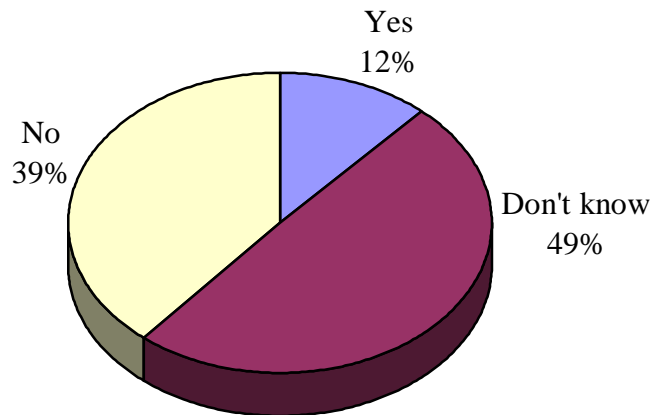
More respondents were aware of the phrase Free-range chicken than Pastured Poultry chicken. Still, the majority (67%) of all respondents had not heard the phrase “Free-range” when purchasing chicken. Six percent (6%) of respondents had heard this phrase once, eight percent (8%) had heard it 2-3 times, and nineteen percent (19%) had heard the phrase more than three times (see Figure 13).

Figure 13. Number of times respondents had heard the phrase "Free-range" when purchasing chicken



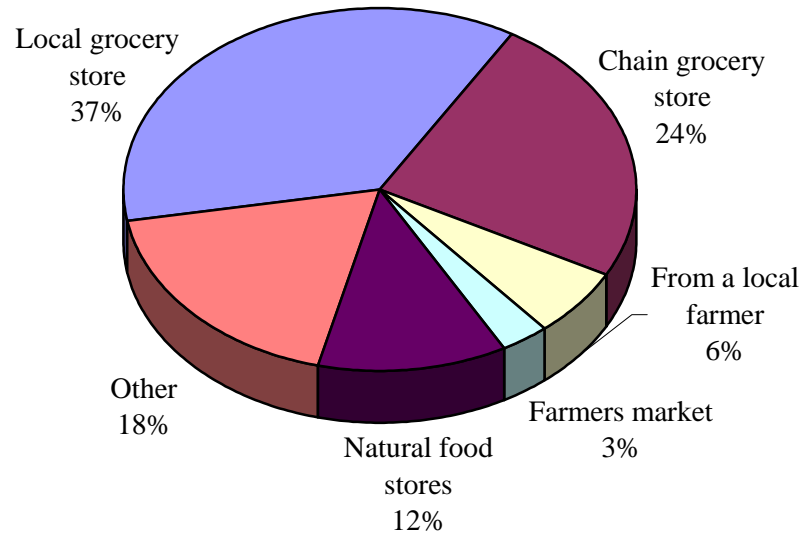
Twelve percent (12%) of the respondents indicated they had purchased a Free-range chicken when they were shopping, while about half of them (49%) said they had not. A total of thirty-nine percent (39%) said they “did not know” whether or not they had purchased Free-range chicken (see Figure 14).

Figure 14. Have respondents purchased "Free-range" chicken?



Of the respondents who said they had bought Free-range chicken, twenty-four percent (24%) of them purchased it at a chain grocery store, thirty-six percent (36%) in a local grocery store, and twelve percent (12%) bought it in a natural food store (see Figure 15).³

Figure 15. Where respondents purchase "Free-range" chicken



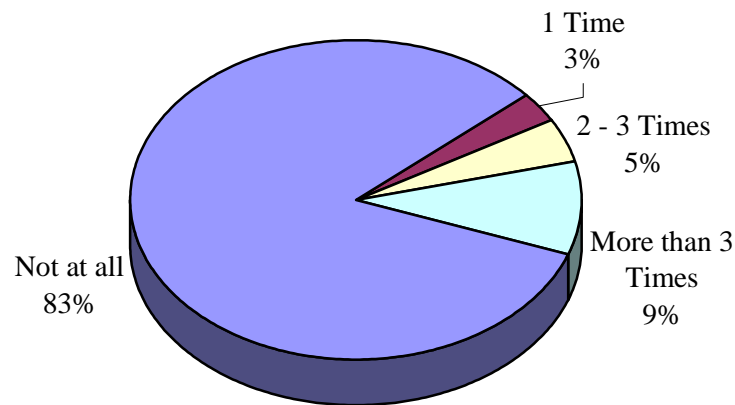
Seventy-two percent (72%) of the respondents indicated the price for Free-range chicken was more than other poultry products, and twenty-five percent (25%) indicated the price was about the same as other poultry products. Only three percent (3%) of respondents indicated that Free-range chicken cost less than other poultry products.

Questions about “Free-range” Eggs

Respondents were asked if they had ever heard the phrase “Free-range” when purchasing eggs. Three percent (3%) had heard this expression only once, five percent (5%) heard the phrase 2-3 times, and nine percent (9%) had heard this phrase more than three times. Eighty-three percent (83%) of all respondents had not heard the phrase Free-range in regard to eggs (see Figure 16).

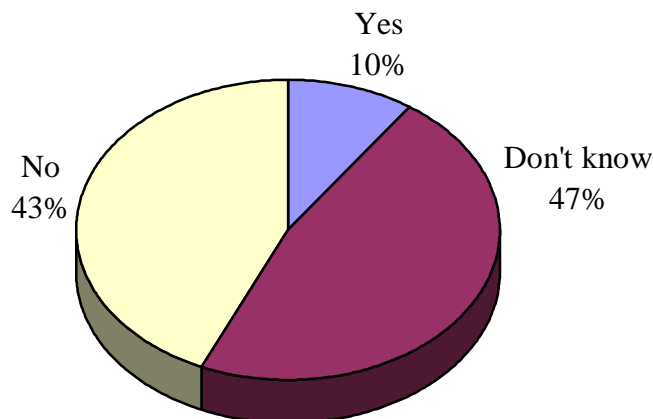
³ Based on the limited number of respondents who indicated they had purchased Free Range products, the percentages in Figures 15 and 18 are not necessarily statistically representative of the population as a whole.

Figure 16. Number of times respondents had heard the phrase "Free-range" when purchasing eggs



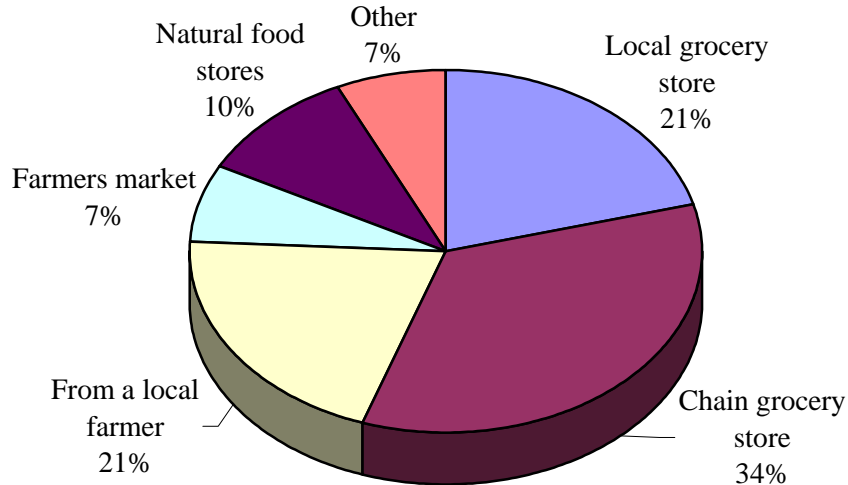
Ten percent (10%) of the respondents said they had purchased Free-range eggs when they went shopping, while forty-three percent (43%) had not purchased any. Nearly half of all respondents (47%) were not sure whether they had purchased Free-range eggs (see Figure 17).

Figure 17. Have respondents purchased "Free-range" eggs?



Thirty-four percent (34%) of the respondents who have purchased Free-range eggs, bought the eggs at a chain grocery store, twenty-one percent (21%) in a local grocery store, twenty-one percent (21%) from a local farmer, and ten percent (10%) bought them in a natural food store (see Figure 18). Sixty-one percent (61%) of respondents said the price for Free-range eggs was more than other poultry products, and thirty-six percent (36%) said the price was about the same as other poultry products. Only three percent (3%) said Free-range eggs were less than other poultry products.

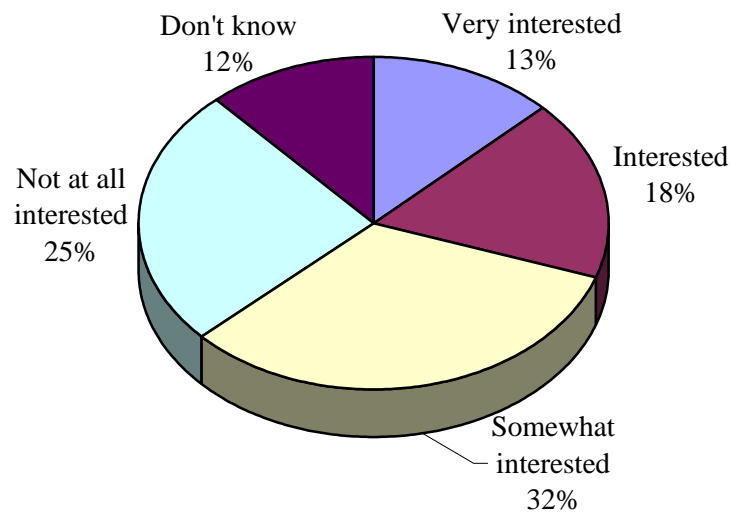
Figure 18. Where respondents purchase "Free-range" eggs



Questions about buying “Free-range” Products

Thirteen percent (13%) of all respondents would be “Very Interested” in buying Free-range chicken or eggs if it was available in their community. Eighteen percent (18%) expressed that they were “Interested”, while an additional thirty-two percent (32%) noted that they were “Somewhat Interested,” to purchase Free-range chicken or eggs. One-quarter of the respondents (25%) were “Not at all Interested” (see Figure 19).

Figure 19. Level of interest among respondents to purchase "Free-range" chicken or eggs if available in their community



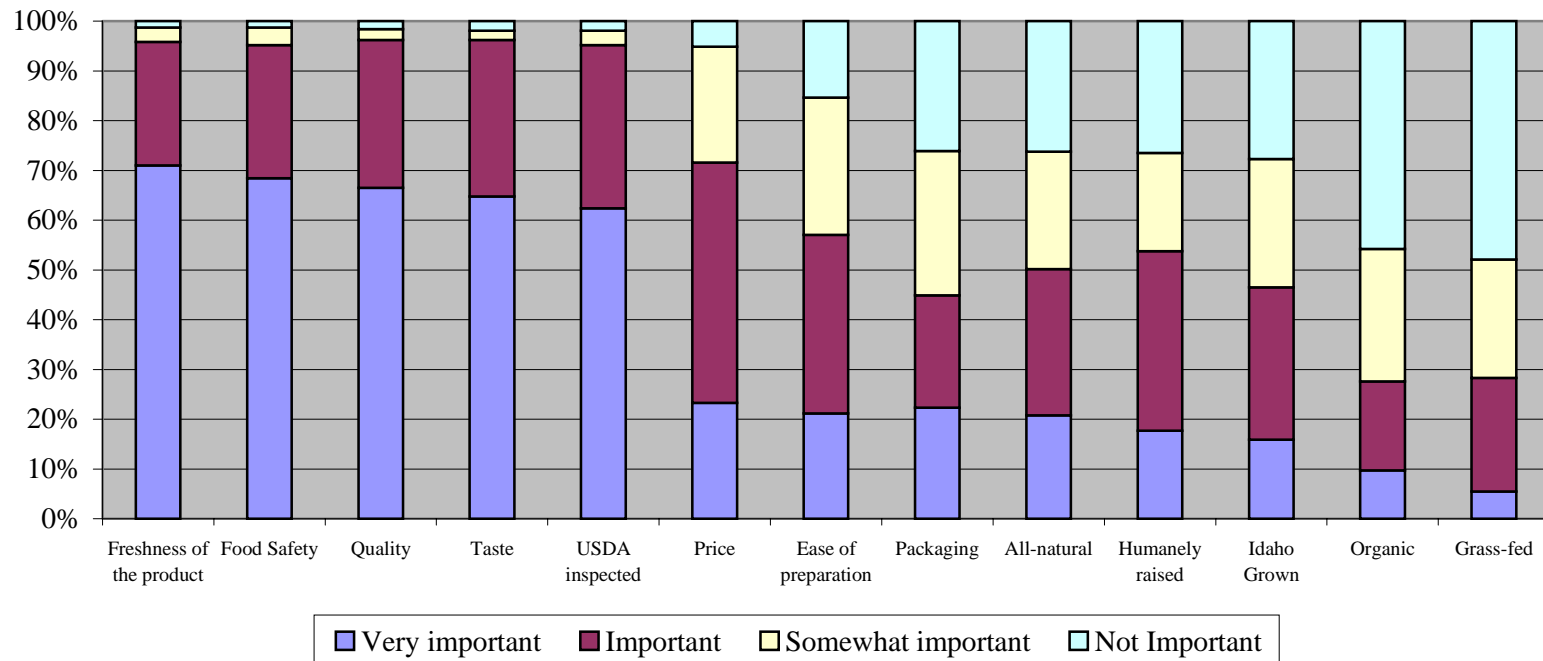
The respondents, who were “Very Interested, Interested, or Somewhat Interested” in buying Free-range chicken or eggs were asked how much they would be willing to pay for these two products. For Free-range chicken, sixty-six percent (66%) said the price should be the same as that for other chicken, while twenty-one percent (21%) of the respondents indicated the price should be \$2.00 - \$2.25 per pound. Six percent (6%) of respondents indicated they would pay \$2.26 - \$2.50 per pound, and four percent (4%) noted they would pay up to \$2.51 - \$2.75 per pound.

Concerning the price of Free-range eggs, sixty-six percent (66%) of the respondents also indicated the price should be the same as that for another dozen eggs. An additional twenty-seven percent (27%) of respondents noted they were willing to pay \$1.50 - \$1.99 per dozen, while five percent (5%) indicated they would pay up to \$2.00 - \$2.99 per dozen.

Factors affecting purchase of poultry products

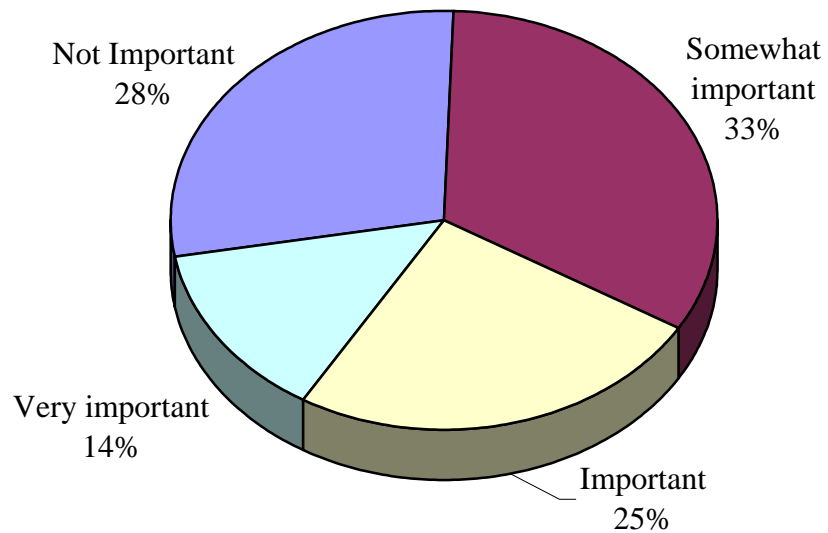
According to this sample of respondents, the five most important characteristics when “buying poultry products” are: Freshness of the Product (71%), Food Safety (69%), Quality (67%), Taste (65%), and USDA Inspected (62%). Over fifty percent (50%) of respondents also expressed the attitude that characteristics such as products being “humanely raised,” “Idaho grown,” “Organic,” and “Grass-fed,” were at least somewhat important. The remaining importance levels for other categories are shown in Figure 20.

Figure 20. Importance of characteristics to respondents when purchasing poultry products



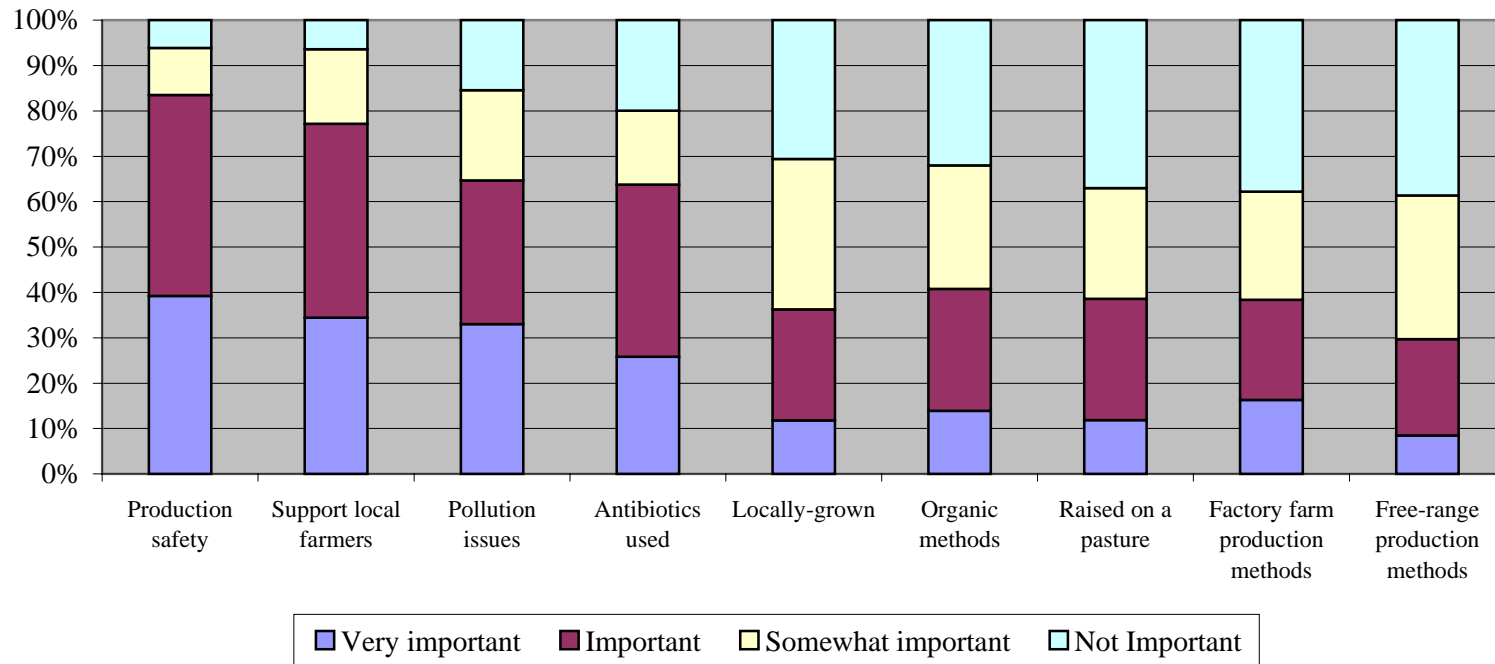
Fourteen percent (14%) of all respondents said it is “Very Important” to know how the poultry they purchase was grown, while twenty-five percent (25%) said it was “Important”, and thirty-three percent (33%) said that characteristic was “Somewhat Important.” Twenty-eight percent (28%) of all respondents indicated that knowing how the poultry they purchase was grown was “Not Important” (see Figure 21).

Figure 21. Level of importance to respondents to know how the poultry they purchase was grown



The characteristics related to the “production of poultry products” that respondents said were “Very Important” in deciding what products to buy are: Production Safety (39%), Support for Local Farmers (34%), Pollution Issues (33%), and Antibiotics Used (26%). The remaining importance levels for other categories are shown in Figure 22.

Figure 22. Importance of characteristics related to the production of poultry products to the respondents in deciding what products to purchase



Summary

- ✂ More than half (58%) of the respondents purchase their groceries from chain grocery stores, while fewer respondents (37%) purchase groceries at local grocery stores most of the time. Most respondents buy chicken and eggs; additionally, most do so on at least a monthly if not more frequently.
- ✂ Most of the respondents had not heard the phrase “Pastured Poultry” when they purchase chicken or eggs and few of very few of them have purchased Pastured Poultry chicken or eggs. Of those who have purchased the Pastured Poultry chicken or eggs, most of them believe the price is higher or about the same as other poultry products.
- ✂ About one-third of all respondents would be “Very Interested” or “Interested” in buying Pastured Poultry chicken or eggs if the products are available in their community, with an additional one-third “Somewhat Interested.” Almost two-thirds of the respondents indicated the price for Pastured Poultry chicken or eggs should be the same as that for other chicken or dozen eggs.
- ✂ The majority of respondents had also not heard the phrase “Free-range” when purchasing chicken or eggs. Only ten percent (10%) of the respondents had actually purchased Free-range chicken or eggs and almost all of them indicated the price was higher or about the same as other poultry products.
- ✂ About one-third of all respondents would be “Very Interested” or “Interested” in buying Free-range chicken or eggs if it was available in their community, with an additional one-third of respondents “Somewhat Interested. About two-thirds of the respondents said the price for Free-range chicken or eggs should be the same as that for other chicken or dozens of eggs.
- ✂ The five most important characteristics to the respondents when buying poultry products are: freshness of the product, food safety, quality, taste, and USDA inspected.
- ✂ Almost one-third of all respondents indicated knowing how the poultry they purchase was grown is “Very Important” or “Important”, with an additional one third indicating it was “Somewhat Important” to know.
- ✂ The four most important characteristics related to the production of poultry products to the respondents in deciding what products to buy are: Production Safety, Support for Local Farmers, Pollution Issues, and use of Antibiotics.

Appendices

Appendix 1. Questionnaire

Pastured Poultry Survey 2002

INTRODUCTION:

Hello, may I please speak to: _____

My name is _____ and I'm calling from the Social Science Research Unit at the University of Idaho. We are conducting a study to learn more about consumer practices concerning poultry products. A week ago we sent you a postcard to explain about this study. Did you receive the postcard?

"NO" > The postcard sent to you contained a short explanation about the study, and said we would be calling you this week.

We would like to talk with the **primary grocery shopper** in your household. Would that happen to be you?

"NO"> Is this person available?

"NOT HERE" > When would be good time for me to call back?

"YES"> Is this a convenient time for a 15 minute interview?

"YES"> REFER TO COMPUTER SCREEN

"NOT NOW" > When would be a good time to call back?

TAKE DOWN CALLBACK INFORMATION:

Time to call back: _____

Who the primary grocery shopper is: _____

QUESTIONS:

Q01. Thinking about when you shop, **where** do you most often buy your groceries? Is it at a....

1. ____ Local grocery store
2. ____ Chain grocery store
3. ____ From a local farmer
4. ____ Farmers market
5. ____ Natural food stores
6. ____ Other _____

Q02. When you grocery shop which of the following poultry products do you buy...?

YES NO

- | | | | |
|----|---------|---|---|
| a. | Eggs | 1 | 2 |
| b. | Chicken | 1 | 2 |
| c. | Turkey | 1 | 2 |
| d. | Duck | 1 | 2 |

(If no Eggs or Chicken, thank them and hang up.)

Q03. How often do you buy eggs, chicken, turkey, or duck in a month?
Would you say:

- | | NOT
at all | 1-2
Times | 3-5
Times | 6-10
Times | 11 or More
Times | |
|----|-----------------------|----------------------|----------------------|-----------------------|-----------------------------|---|
| a. | Eggs | 1 | 2 | 3 | 4 | 5 |
| b. | Chicken | 1 | 2 | 3 | 4 | 5 |
| c. | Turkey | 1 | 2 | 3 | 4 | 5 |
| d. | Duck | 1 | 2 | 3 | 4 | 5 |

Q04. As you buy chicken, HOW often have you heard the word **Pastured Poultry**? By **Pastured Poultry** I mean growing methods that involve pasture, soil improvements, and environmental stewardship.

1. ____ NOT AT ALL
2. ____ 1 TIME
3. ____ 2-3 TIMES
4. ____ MORE THAN 3 TIMES

Q05. Have you bought a **Pastured Poultry** chicken when you were shopping?

- 1. ☐ YES
- 2. ☐ DON'T KNOW (SKIP to Q8)
- 3. ☐ NO (SKIP to Q8)

Q06. Where did you buy the Pastured Poultry chicken? Was it at a....

- 1. ☐ Local grocery store
- 2. ☐ Chain grocery store
- 3. ☐ From a local farmer
- 4. ☐ Farmers market
- 5. ☐ Natural food stores
- 6. ☐ Other _____

Q07. Thinking about buying **Pastured Poultry**, was the price...

- 1. ☐ Less than other poultry products
- 2. ☐ More than other poultry products
- 3. ☐ About the same as other poultry products

Q08. As you buy eggs, HOW often have you heard the word **Pastured Poultry**?

Read the definition again only if they ask. By **Pastured Poultry** I mean growing methods that involve pasture, soil improvements, and environmental stewardship.

- 1. ☐ NOT AT ALL
- 2. ☐ 1 TIME
- 3. ☐ 2-3 TIMES
- 4. ☐ MORE THAN 3 TIMES

Q09. Have you bought **Pastured Poultry** eggs when you were shopping?

- 1. ☐ YES
- 2. ☐ DON'T KNOW (**SKIP to Q12**)
- 3. ☐ NO (**SKIP to Q12**)

Q10. Where did you buy the **Pastured Poultry** eggs? Was it at a....

1. ☐ Local grocery store
2. ☐ Chain grocery store
3. ☐ From a local farmer
4. ☐ Farmers market
5. ☐ Natural food stores
6. ☐ Other _____

Q11. Thinking about buying **Pastured Poultry** eggs, was the price of the eggs ...

1. ☐ Less than other poultry products
2. ☐ More than other poultry products
3. ☐ About the same as other poultry products

Q12. How interested would you be in buying **Pastured Poultry** chicken or eggs if it was available in your community? Would you be....

1. ☐ Very interested
2. ☐ Interested
3. ☐ Somewhat interested
4. ☐ Not at all interested (SKIP TO Q15)
5. ☐ Don't know (SKIP TO Q15)

Q13. How much would you be willing to pay for **Pastured Poultry** chicken?

1. ☐ Same price as other chicken
2. ☐ \$2.00 - \$2.25 a pound
3. ☐ \$2.26 - \$2.50 a pound
4. ☐ \$2.51 - \$2.75 a pound
5. ☐ DON'T KNOW

Q14. How much would you be willing to pay for **Pastured Poultry** eggs?

1. ☐ Same price as other dozen eggs
2. ☐ \$1.50-\$1.99 A DOZEN
3. ☐ \$2.00-\$3.00 A DOZEN
4. ☐ MORE THAN \$3.00 A DOZEN
5. ☐ DON'T KNOW

Now I would like to ask you some questions about **Free-range** poultry. By **Free-range** I mean poultry that is grown with an emphasis on humane treatment of animals.

Q15. As you buy chicken, HOW often have you heard the word **Free-range**?

- 1. ____ NOT AT ALL
- 2. ____ 1 TIME
- 3. ____ 2-3 TIMES
- 4. ____ MORE THAN 3 TIMES

Q16. Have you bought **Free-range** chicken when grocery shopping?

- 1. ____ YES
- 2. ____ DON'T KNOW (**SKIP to Q19**)
- 3. ____ NO (**SKIP to Q19**)

Q17. Where did you buy the **Free-range** chicken? Was it at

- 1. ____ Local grocery store
- 2. ____ Chain grocery store
- 3. ____ From a local farmer
- 4. ____ Farmers market
- 5. ____ Natural food stores
- 6. ____ Other _____

Q18. Thinking about buying **Free-range** chicken, was the price ...

- 1. ____ Less than other poultry products
- 2. ____ More than other poultry products
- 3. ____ About the same as other poultry products

Q19. As you buy eggs, HOW often have you heard the word **Free-range**?

Read the definition again only if they ask. By **Free-range** I mean eggs that are produced with an emphasis on humane treatment of animals.

- 1. ____ NOT AT ALL
- 2. ____ 1 TIME
- 3. ____ 2-3 TIMES
- 4. ____ MORE THAN 3 TIMES

Q20. Have you bought **Free-range** eggs when you were shopping?

1. ☐ YES
2. ☐ DON'T KNOW (**SKIP to Q23**)
3. ☐ NO (**SKIP to Q23**)

Q21. Where did you buy the **Free-range** eggs? Was it at a

1. ☐ Local grocery store
2. ☐ Chain grocery store
3. ☐ From a local farmer
4. ☐ Farmers market
5. ☐ Natural food stores
6. ☐ Other _____

Q22. Thinking about buying **Free-range** eggs, was the price...

1. ☐ Less than other poultry products
2. ☐ More than other poultry products
3. ☐ About the same as other poultry products

Q23. How interested would you be in buying **Free-range** chicken and eggs if it was available in your community? Would you be....

1. ☐ Very interested
2. ☐ Interested
3. ☐ Somewhat interested
4. ☐ Not at all interested (**SKIP TO Q26**)
5. ☐ Don't know (**SKIP TO Q26**)

Q24. How much would you be willing to pay for **Free-range** chicken?

1. ☐ Same price as other chicken
2. ☐ \$2.00 - \$2.25 a pound
3. ☐ \$2.26 - \$2.50 a pound
4. ☐ \$2.51 - \$2.75 a pound
5. ☐ DON'T KNOW

Q25. How much would you be willing to pay for **Free-range** eggs?

1. _____ Same price as other dozen eggs
2. _____ \$1.50-\$1.99 A DOZEN
3. _____ \$2.00-\$3.00 A DOZEN
4. _____ MORE THAN \$3.00 A DOZEN
5. _____ DON'T KNOW

Q26. How important are the following characteristics to you when buying poultry products? The...

	Not Important	Somewhat Important	Important	Very Important
a. Freshness of the product	1	2	3	4
b. Quality	1	2	3	4
c. Taste	1	2	3	4
d. Packaging	1	2	3	4
e. Idaho grown	1	2	3	4
f. Organic	1	2	3	4
g. All-natural	1	2	3	4
h. Grass-fed	1	2	3	4
i. Humanely raised	1	2	3	4
j. USDA inspected	1	2	3	4
k. Price	1	2	3	4
l. Food safety	1	2	3	4
m. Ease of preparation	1	2	3	4

Q27. How important is it for you to KNOW how the poultry you buy was grown? Is it...

1. _____ NOT IMPORTANT
2. _____ SOMEWHAT IMPORTANT
3. _____ IMPORTANT
4. _____ VERY IMPORTANT

Q28. I am going to read a list of possible characteristics related to the production of poultry products. Please tell me how IMPORTANT each of these characteristics are to you in deciding what products to buy.

	Not Important	Somewhat Important	Important	Very Important
a. Locally-grown	1	2	3	4
b. Free-range production Methods	1	2	3	4
c. Factory farm production methods	1	2	3	4
d. Antibiotics used	1	2	3	4
e. Organic methods	1	2	3	4
f. Raised on a pasture	1	2	3	4
g. Pollution issues	1	2	3	4
h. Support local farmers	1	2	3	4
i. Production safety	1	2	3	4

Now I have a few background questions for statistical purposes:

Q29. What is the highest level of education you have completed?

1. ___ Less than High School
2. ___ High School graduate
3. ___ Some college or vocational training
4. ___ College graduate
5. ___ Advanced degree
6. ___ No answer

Q30. Who does the majority of grocery shopping in your household? Is it...

1. ___ Yourself
2. ___ Wife
3. ___ Husband
4. ___ Combination of husband and wife
5. ___ Significant other
6. ___ Older child
7. ___ Other

Q31. How many individuals live in your household? Is there....

1. _____ One person
2. _____ Two people
3. _____ 3 to 5 people
4. _____ 6 to 10 people
5. _____ More than 10 people

Q32. Please tell me which if these descriptions best describes where you currently live? Stop me when I have read the category that describes where you live.

1. _____ Rural Farm
2. _____ Rural non-farm
3. _____ Town with 100 to 2,500 population
4. _____ 2,500 to 10,000
5. _____ 10,000 to 50,000
6. _____ 50,000 to 100,000
7. _____ 100,000 or more

Q33. I'm going to read to you some categories of family incomes before taxes. Please

tell me which one best describes your family income LEVEL.

1. Less than \$10,000
2. \$10,000 to \$20,000
3. \$20,000 to \$30,000
4. \$30,000 to \$40,000
5. \$40,000 to \$50,000
6. \$50,000 to \$60,000
7. \$60,000 to \$70,000
8. \$70,000 or more
9. Prefer NOT to answer (DON'T READ THIS OPTION only mark if they choose it)

Q34. Are you male or female? (DON'T ASK NEXT JUST ANSWER)

1. _____ MALE
2. _____ FEMALE

Thank you for taking the time to answer my questions.

Appendix 2. Pastured Poultry Counties

County

- 1 Washington
- 2 Payette
- 3 Gem
- 4 Canyon
- 5 Owyhee
- 6 Ada
- 7 Elmore
- 8 Boise
- 9 Valley
- 10 Custer
- 11 Blaine
- 12 Canvas
- 13 Gooding
- 14 Lincoln
- 15 Jerome
- 16 Twin Falls
- 17 Minidoka
- 18 Cassia

Appendix 3. Postcard

January 2002

Dear Resident,

Next week the University of Idaho's Social Science Research Unit will be calling you to participate in a study about Poultry. The purpose of the project is to learn about options for expanding local markets.

We are writing in advance of our telephone call to let you know that a study is being done and that you will be called within the next week.

The interview should take about 12 minutes. If we call when you are busy please tell the interviewer and they will call back at another time.

If you have any questions please call the Social Science Research unit, at our toll-free number: 1-877-542-3019.

Sincerely,

Janie Burns